

Notes from SAM Refresher Training  
March 1, 2006

**Open discussion:**

**Q: VCU – If a cardholder is leaving the University and they have had transactions on their card, when I move them to the Closed folder I have, should I move just the cardholder only?**

A: Yes, move only the cardholder so the transactions stay in the folder where they were originally placed for historical reporting purposes.

**Q: VCU – What is the Customer Code Field?**

A: This is a field a vendor is set up to pass Level 3 data they can populate this field with a PO number or other reference that you provide..

**Q: DMV – On the query you just set up, the results said no results for the criteria, does that mean there were truly no results or it did not run properly?**

A: It means that based on the query criteria you selected, there was no data that matched your query..

**Q: ? – In Transaction review, is there a default criteria that is set? If you delete a certain criteria will it change the default??**

A: There is a default set for Transaction Review and you can change the default if you wish, but if you change the query and do not save it as your default, it will automatically go back to the original default criteria.

**Q: VCU – Why would a PA need to split a transaction in Transaction Review?**

A: Depending on how agencies are utilizing this function in SAM, if an order for 10 cases of paper comes through and 2 cases need to go to one budget code and 8 cases to another, you have the ability to split the transaction out based on dollar amount or percent.

**Q: DEQ: On the DMBE SWAM Report there was a vendor that was showing as DMBE Certified but had all No's in the Small, Woman and Minority columns? What do we do?**

A: Since DMBE is the owner of that data, please contact DMBE and alert them of the vendor issue. If anyone sees any discrepancies regarding the data on the report, whether a vendor shows up on the report that you know is not Certified or one you know is Certified but not showing up, please contact DMBE.

**Q: DHP: The 1099 reports are not accurate.**

A: As we have discussed on Monthly calls and in training, the 1099 data is based on what the vendor provides their Acquiring Bank at the time of agreeing to

accept MasterCard. This is the same when we were with AMEX, it was dependent on whether the vendor provided that data at the time they agreed to accept AMEX. Each agency must determine the 1099 reportability for all purchases whether on the PCard or not.

**Q: City of Norfolk: I need to give access to people in case of emergency so they can change limits in case I or the backup is not available. What do I need to do to set this up?**

A: Submit a PA form which is located on our webpage under Forms.

**Q: ?: If we are not on the Virginia database and we need access to run the DMBE report what do we do?**

A: A SAM Request Form must be submitted and indicate you need DMBE report access and a user id will be set up in the Virginia database for your agency so they can run the DMBE report. We are not loading the DMBE data into the individual databases only into the main Virginia database; therefore, the need to have separate user id for this.

**Additional notation – Just a reminder to cardholders to never give cardholder account information to anyone who calls claiming they need this information. If cardholders receive such a call for their GE MasterCard, recommend that they hang up and contact the CRR number at 1-866-843-1368.**